

Attachment A

**Western Area Power Administration**



**Administrative Services**

**Performance Work Statement**

**February 2010**

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## **1.0 GENERAL**

### **1.1 Background.**

The Western Area Power Administration (WAPA/Western), an agency of the Department of Energy (DOE), Corporate Office (CSO) is located in Lakewood, Colorado and was established in December 1977. Western markets and delivers reliable, cost-based hydroelectric power and related services within a 15-state service area of the central and western U.S. The Sierra Nevada Region (SNR) is also responsible for the planning, design, construction, operation, and the maintenance of Federal transmission facilities. Four customer service regions are located in Billings, Montana (Upper Great Plains); Folsom, California (SNR); Loveland, Colorado (Rocky Mountain); and Phoenix, Arizona (Desert Southwest). A customer service center responsible for coordinating Colorado River Storage Project power issues is located in Salt Lake City, Utah (Colorado River Storage Project).

### **1.2 Location.**

SNR is headquartered at 114 Parkshore Drive, Folsom, California, 95630 and is responsible for a geographic service territory which includes Northern California and part of the State of Nevada. Additional personnel are remotely stationed at the following maintenance sites: Elverta Maintenance Facility and Switchyard (EMF), Redding Maintenance Facility (RMF), Keswick Field Office (KFO), and Tracy Maintenance Facility (TMF).

**1.3 Quality Assurance.** The Government will monitor the Contractor's performance under this contract using the Quality Assurance Surveillance Plan (QASP) inspections (See Paragraph 8.0 Quality Assurance Surveillance Plan.). The COR will inspect for compliance with contract terms. All surveillance observations will be recorded. If the Contractor's Program Manager (PM) does not agree with the COR's surveillance indicating defective performance, the PM shall submit a written response to the CO or designated representative within 2 working days after being provided the surveillance document(s).

**1.4 Performance Evaluation Meetings.** The Contractor's PM shall meet with the CO or COR(s) weekly during the first month of the contract. Thereafter, they shall meet at least once a month. When a meeting is held, the Contractor shall prepare a memorandum for record of the discussions and send the original to the CO, and furnish a copy to the COR(s). Meetings are considered to be a part of normal business operations and shall not be separately priced.

**1.5 Removal of Employees for Cause.** The CO can require that the Contractor immediately bar any contractor employee from performing further work under this contract for any of the following actions: Willful destruction or mishandling of government, vendor property; carry or use of weapons, use of any tobacco products in other than designated areas; use of alcoholic beverages; illegal drugs or illegal use of controlled substances; theft; execution of work in other than a skillful manner, displaying disruptive/unacceptable behavior (e.g., abusive, demeaning, foul or threatening language and fighting), and willful violations of safety and security standards by Contractor personnel. Removal of any employee for such cause shall not constitute a valid basis for nonperformance of contract services or a claim for additional compensation. If a contract employee is removed for cause, all identification and access privileges to Western/SNR facilities will be terminated by the Safety and Security Office.

## 2.0 **SCOPE OF WORK**

### 2.1 **Contractor Responsibilities.**

The Contractor shall be responsible for managing and overseeing a total work effort that will furnish all personnel supervision, and services as specified, and to perform administrative, technical, facility and vehicle maintenance and warehousing/property management services. As workload needs and/or requirements change, the contractor shall assure that employees are appropriately cross-trained so that key services will continue to be provided.

### 2.2 **Reporting Structure.**

The Contractor on site Program Manager (PM) shall serve as the principal on-site point of contact between the contractor and the specifically designed representatives of the government (e.g., CO, COR, and any other government-designated points of contact) for all performance-related matters on the contract. The Program Manager is responsible for the overall coordination, supervision, and management of the specific tasks and activities identified in the Performance Work Statement (PWS) and ensuring that such activities and tasks are performed accurately, timely, and within the quality assurance standards outlined and agreed to by the contractor. The PM may use team leads to support these duties, but this does not relinquish or diminish the PM's obligations as specified herein. The PM shall be responsible to plan and make work assignments to subordinates, provide cross training for administrative personnel, monitor and assess performance, address conduct, direct hours of work, and make all associated administrative decisions. Government personnel shall not be responsible for supervising contractor personnel.

### 2.3 **Security.**

2.3.1 **Building Security.** Security of SNR facilities is a shared responsibility of both Federal and Contractor employees. The Contractor shall be required to perform tasks to assist SNR in identifying potential hazards and to assure that the integrity of the facilities is maintained. Contract personnel will adhere to all prescribed security and safety requirements to assist in maintaining the secure integrity of SNR property and facilities. During duty hours, the Contractor shall monitor mail, packages, and deliveries to identify potential hazards. Contractor employees shall notify the Regional Safety and Occupational Health Manager, the Regional Facilities Manager, or their designees, and after normal business hours, the Security Guard posted on duty whenever any suspicious/unusual activities and or persons are noticed. Contractor employees will be issued and shall protect identification and access control badges and notify the Regional Safety and Occupational Health Manager immediately if badges are lost.

2.3.2 **Security Investigations Check.** WES-H-1044, Security processing for support service contractor and subcontractor personnel working on a Western site.

2.4 **Contractor Quality Control Plan.** The Contractor shall establish and forward to the CO and COR an initial, complete quality control plan within 2 weeks after award. The Contractor shall, subsequently, provide an updated copy of the quality control plan to the CO and COR as changes occur throughout the period of performance for the contract. At a minimum the plan should include the following:

2.4.1 **Inspection System.** The Contractor shall establish an inspection system that covers all the services to be performed under this contract. The inspection system shall identify the

areas and items to be inspected, methods of inspection, inspection frequency, and the name(s) and title(s) of the person(s) who shall perform the inspection.

- 2.4.2 **Methods of Identifying Deficiencies.** The Contractor shall establish methods for identifying and preventing deficiencies in the quality of services performed before the level of performance becomes unacceptable.
- 2.4.3 **Documenting Inspections/Results.** The Contractor shall establish checklists for documenting all inspections conducted along with corrective actions taken. This documentation shall be immediately available to designated Government representatives at any time during the term of the contract.
- 2.5 **Performance Contingency Plan.** The Contractor shall provide to the CO and COR an initial Performance Contingency Plan within 2 weeks after award. The Contractor shall subsequently provide an updated copy of the Performance Contingency Plan to the CO and COR as changes occur throughout the period of performance for the contract. At a minimum this plan shall indicate:
  - 2.5.1 How the Contractor shall notify the CO or COR of possible disruption to contract performance to include any employee time-off and vacated positions.
  - 2.5.2 How the Contractor shall perform all work under this contract with minimum disruption of services to SNR.
  - 2.5.3 How the Contractor shall continue operations in the event of a National Security Alert or disaster that disables the facility.
- 2.6 **Travel.** It may be necessary for contract employees to periodically travel to other regions or off-site locations in the performance of duties. Travel will be requested and authorized in advance and reimbursed based on actual cost and not to exceed the maximum allowable under the Federal Travel Regulations (FTR). Contractor shall provide trip reports upon completion of trip.
- 2.7 **Training.** Contractor employees shall have the initial training and skills needed to meet position requirements. SNR agrees to pay for training directly related to a particular function as deemed appropriate and required by CO and/or COR. Contractor's time will be paid at rate of 8 hours a day for any full day of training required by the government.
- 2.8 **Overtime.** Overtime may be required as directed by the Government and must be approved by the COR and/or the CO in advance of the work being performed. When overtime is authorized by the Government, the Contractor shall submit documentation as to the date(s) the overtime is planned, the purpose of overtime, and the number of overtime hours estimated for approval by the COR and/or CO. Overtime required to complete Field Service Requests must be approved by the COR making the request and must be accompanied by a "Contractor Overtime Request to Support Field Service Calls" form (see Appendix D). Actual overtime worked shall not exceed pre-approved hours. Contractor shall submit monthly overtime reports.
- 2.9 **Hours of Work.** SNR standard business hours are 7:30 – 4:30 Monday through Friday. The Contractor shall insure all regularly assigned personnel, unless otherwise indicated, are present and available for duty Monday through Friday (except holidays, official early releases or facility closures i.e. those granted by the President of the United States, the Secretary or other high ranking official within the Department of Energy, Western's Administrator and/or the SNR Regional Manager). Business hours may vary for the other functional offices at the Folsom site

as well as the other maintenance sites (e.g., EMF and RMF). The Contractor shall insure staff hours are such that sufficient coverage is provided during business hours. The on-site PM and team leads shall be the focus of interface between the Government personnel and the Contractor.

- 2.10 **Safety.** In performing the work required by this contract, the Contractor shall comply with all applicable Federal, State, and local safety, health, or industrial safety codes including the latest effective standards promulgated by the Secretary of Labor for the Department of Labor and Health Administration, Safety and Health Standards (29 CFR 1910) and CalOSHA. Whenever there is a conflict between the requirements of applicable Federal, State, or local safety, health, or industrial safety codes, the most stringent standard shall apply. The Government shall be liable only for negligence on the part of its employees under the Federal Claims Act as amended. All safety-related equipment needed by Contractor employees shall meet the requirements of the task to address hazards and will be utilized in accordance with prescribed standards. All personal protective equipment utilized will be IAW Western's Personal Protective Equipment (PPE) Guide, latest version. All PPE purchases shall be approved in advance by the COR/CO, purchased by the contractor and billed to Western at cost not to exceed pre-approved and authorized amounts. In particular, warehouse and vehicle maintenance employees and those contract employees assigned field support duties that require protective equipment utilize safety boots (ASTM F2413-05) and safety glasses (ANZI 87-1) per facility and task requirements as directed by Western and OSHA requirements. Government reimbursement for safety shoes and safety glasses is limited to one purchase every two years and in amounts specified in Western policy.
- 2.10.1 The Contractor shall establish and submit to the COR for review and approval, a safety program within 60 days after award of the contract. The Contractor shall: assure all facilities, including the warehouse and the yard and vehicle maintenance areas are neat and orderly, perform job hazard analysis of unusual job requirements and inspect and assure all forklifts, hand tools, and other equipment are properly used and maintained. The Contractor shall ensure that its employees have been appropriately instructed and trained in the proper use of any equipment, vehicles, and/or personal protective equipment which may be needed for the performance of duties. The Contractor shall assure that its employees comply with all appropriate Federal, State, and/or local safety rules and regulations in performance of duties.
- 2.10.2 The Contractor shall report any on-the-job accidents immediately to both the COR and the Safety and Occupational Health Manager and meet all written reporting requirements in accordance with Western and SNR policies and procedures. In the event an incident which did not result in an injury or loss (i.e., near miss) occurs, the Contractor shall prepare a short report for the COR and the Safety and Security Officer identifying the nature of the hazard and the corrective actions implemented to prevent a recurrence in the future.

## 2.11 **Miscellaneous**

- 2.11.1 Excess Property. The contractor shall screen excess lists and watch for irregularities in all areas of responsibility.
- 2.11.2 Class C license. Unless holding a valid Class “A” license, any contractor personnel required to operate a government vehicle to perform the duties herein shall maintain a valid State of California Class “C” Driver’s license.
- 2.11.3 Contract employees operating government vehicles will be licensed and qualified to operate the motor vehicle assigned to the function to include participation in a defensive driver’s training class as outlined in Western’s Occupational and Safety and Health Program, Western Order 440.1 (latest version). The contractor is responsible for assuring that employees hired/retained for positions that require a Class C license have those licenses at the time of hire.

## 3.0 **SUMMARY OF REQUIREMENTS**

- 3.1 **General.** The Contractor shall provide a dedicated on-site general management and supervision for all work designated under this contract. The Contractor shall make all reasonable efforts to assure that employees are appropriately cross-trained so that during the absence of staff, key services shall continue to be provided. The on-site Program Manager (PM) shall provide administrative supervision and technical leadership for all other Contract employees. The PM based on knowledge of regional activities and known requirements, shall proactively plan projects, make work assignments to subordinate personnel, monitor work and assess performance, direct hours of work, and make all administrative decisions regarding projects. The program manager is responsible for providing monthly status reports to include budget and performance reports. The PM shall be capable of, and may be required to perform, additional duties. The PM may use team leads to support these duties.
- 3.2 **Controls and Restrictions.** The following controls and restrictions generally apply to the tasks described below.
  - 3.1.1 Contractor shall not bid on contracts specifically at SNR but is not precluded from bidding on the Administrative Professional Services follow-on contract.
  - 3.1.2 Appropriate Staffing. Within 2 weeks, Contractor shall insure appropriate staffing actions are in place. In the event that the contractor shall be unable to meet this implementation requirement, the contractor shall provide a written response to the CO no later than 5 days prior to the expiration of the 30-day performance window. The letter shall identify why the time requirement cannot be met, what steps are being undertaken, and when the CO can reasonably expect to have the new requirement fully implemented.
- 3.3 **Contractor Management Team.** The contractor management team shall provide for integration and coordination of the multiple disciplines which fall within the scope of support for this contract. Contractor management team shall assist in the establishment of procedures, guidelines, and operating plans for maximum efficiency, security, and cost effectiveness. Contractor shall determine qualifications required to perform a task, hire qualified personnel to fill vacancies, and make appropriate assignments. Contractor management team shall review contractor staff work for completeness and conformance with appropriate standards. Contractor management team shall complete status reports, budget and overtime status reports, performance

metrics reports, and any other reports identified by the government or the Contractor, as necessary.

- 3.4 **Dedicated Personnel.** All personnel shall be dedicated (assigned full time to this Western contract only) in support of this contract. No compensated overtime shall be accomplished without a request from the COR and approval of the CO.
- 3.5 **Vacation Coverage.** Contractor shall ensure appropriate coverage on tasks or projects when personnel take vacation or are otherwise unavailable to perform the duties of this contract.
- 3.6 **Documentation.** The Contractor shall document all processes and procedures using SNR standard applications. The Contractor shall review and update documentation quarterly at a minimum and on an as needed basis or at the CO/CORs request.
- 3.7 **Applicable Documents**
  - 3.7.1 Appendix A – SNR/Western Standards Software.
  - 3.7.2 Appendix B – Staffing Skills.
  - 3.7.3 OMB Circular A130 Management of Information Resources, Security of Automated Information Resources  
<http://www.whitehouse.gov/omb/circulars/a130/a130.html>
  - 3.7.4 National Archives and Records Administration (NARA)  
[http://www.archives.gov/records\\_management/index.html](http://www.archives.gov/records_management/index.html)
  - 3.7.5 Appendix C – Government-Furnished Property

#### **4.0 DESCRIPTION OF WORK TO BE PERFORMED**

- 4.1 **Administrative Services.**
  - 4.1.1 Clerical Support. The Contractor shall perform a variety of administrative tasks. Personnel assigned to this task shall be assigned to SNR and be utilized as a shared resource. Contractor clerical support shall include but not be limited to proficiencies with; word processing, spreadsheet, calendar and other administrative software and be familiar with the use of multi-line phones, fax machines, copiers, scanners, typewriters and other common office equipment. The current word processing software is MS Word. The current spreadsheet standard is MS Excel. The Contractor shall ensure that all Administrative Services are covered 100% of the normal business hours. Normal business hours at the Folsom Office for Administrative Services shall be from 7:30 a.m. to 4:30 p.m. Monday through Friday. The Contractor shall maintain a professional appearance and demeanor at all times. Contractor may be required to provide front desk coverage and/or security desk assistance for short periods of time. Routinely assigned tasks shall include, but not necessarily be limited to, the following:
    - 4.1.2 Manage a multi-line phone and regional conference room calendar.
      - 4.1.2.1 The Contractor shall ensure the multi-line phone is covered 100% of normal business hours and assure the following services are being provided. Contractor shall be responsible for screening incoming telephone calls and personally respond to requests for information concerning office procedures. The Contractor



shall provide information to those telephoning the regional office and quickly determine which requests should be resolved by the contractor, directly connected to the appropriate personnel or accurately record and deliver a message. Recorded messages shall be correctly captured and forwarded in a timely manner to appropriate individual(s) for response.

4.1.2.2 Contractor shall be responsible for scheduling and reserving (when requested) and posting conference room reservations. Contractor shall post conference room calendars on a daily basis. When requested through TeamTrack or current/replacement electronic process, Contractor shall ensure that conference room(s) is/are properly arranged; giving notification to IT only when specialized equipment is requested on the same electronic tracking request for set-up of room.

4.1.2.3 Contractor shall provide a weekly Travel and Leave Report, available electronically and posted to the internal SNR website. Contractor shall receive scheduled travel and leave from designated departmental secretaries.

#### 4.1.3 Government Vehicle Assignment Log

4.1.3.1 Responsible for monitoring use of Government vehicles assigned to SNR Folsom Office motor pool. Safeguard and issue vehicle keys and maintain a vehicle log that among other things, lists all available pooled vehicles, the traveler to which the vehicle is temporarily assigned, date of assignment, destination, date of return, noted condition of vehicle (if provided by driver). Vehicle problems will be reported no later than the next business day to the vehicle mechanic. Vehicles requiring maintenance/repair will not be issued by the contractor until vehicle maintenance/repair is performed.

#### 4.1.4 Word Processing.

4.1.4.1 All personnel shall be proficient in Western's standard applications software, the current application is Microsoft Office. In-house training will be provided whenever major new software is purchased and installed. It must be noted that no additional software can be added to Government equipment, unless required or approved in writing by the Regional Information Officer.

4.1.4.2 Prepare in final form utilizing the above software, from draft or handwritten material a variety of documents including, but not limited to, letters, memorandums, forms, reports, studies, position descriptions, specifications, legal documents, contracts, presentations, spreadsheets, statements of work, and directives. All typing shall be in conformance with: Government Printing Office Style Manual, Western Correspondence Guide, and the Gregg Reference Manual. Power Marketing and other documents (e.g., contracts, Federal Register Notices, etc.) shall conform to applicable styles and formats. Routine material shall be returned to the requestor within 2 working days; priority items shall be completed within 8 hours; and rush jobs shall be completed as requested in 3 hours or less. The complexity of projects assigned may be routine business documents to highly technical engineering, environmental, or contractual documents. The Contractor's onsite Program Manager will coordinate with requestor and/or COR

to determine priorities and to notify customers of possible delays or changes in the delivery in fulfilling requests.

4.1.4.3 Review documents prior to finalizing for typographical errors, spelling, grammar, punctuation, format, and arrangement of materials, and adhere to rules governing spelling, grammar, punctuation, and the standard formats used by Western. Pay strict attention to specific instructions for processing each document including appropriate enclosures, attachments, courtesy copies (cc), and blind courtesy copies (bcc). Distribute and mail signed documents.

4.1.4.4 Create and automate various forms. Post necessary documents to organization's webpage and/or read file and update as necessary. Provide forms maintenance and control. The contractor shall, after researching to ensure a similar form is not already in use, obtain COR approval, issue and maintain all new forms for SNR as needed. Any new form expected to be used Western-wide, shall be reviewed and submitted to the Corporate Services Office (CSO) for approval, design, and printing. Coordination will be necessary with CSO for form numbers, information, advice, and approval. COR will furnish directives concerning design and approval of forms for the contractor.

4.1.4.5 Manage SNR Office Telephone list. As needed, but not less than quarterly, accurately update and/or edit names, phone numbers, organization codes etc. post the phone list in final form electronically, and when requested by the Administrative Officer, issue to all SNR employees in hard copy format.

#### 4.1.5 Records Management.

4.1.5.1 The Contractor shall serve as the focal point for the records management function for SNR. The Contractor shall maintain files in an organized manner so that needed records can be found rapidly, complete records are assured, and the selection and disposition/destruction of obsolete records are accomplished following prescribed procedures. Keep files in their original form. A file is kept in its approved form, draft copies, history of the form, requester, mail code, phone number and quantities ordered. Provide technical support to maintain central files of records following Western's Records Management Manual and which are defined in 44 U.S.C. 3301, "Disposal of Records—Definition of Records," including all books, papers, maps, photographs, or other documentary materials, regardless of physical form or characteristics, made or received by SNR.

4.1.5.2 Contractor shall evaluate file equipment making recommendation for efficient storage of house records. Provide technical support to enter/retrieve documents. Order file supplies such as folders, guide cards, and related items used to maintain and service records by forwarding requisitions to COR. Provide all statistical information for reports as described by DOE Orders. This may include Records Disposition, Annual Reports of Records Holding, etc.

4.1.5.3 Contractor shall perform literature searches and compile bibliographies and other reference librarian functions when requested. This includes all directives, manuals, technical reference material; engineering, power marketing, and similar

type documents; books; magazines; journals; and bulletins. All library material will be kept up to date in an efficient and orderly manner.

4.1.5.4 Maintain a correspondence, engineering, and drawings file system, meeting DOE and Western's guidelines and objectives. The contractor will keep track of all engineering drawings and correspondence checked out by requestors. Any time a document is not in the file, it shall have a charge card file showing all pertinent information such as requestor, date, mail code, and document number. The contractor shall follow up quarterly on overdue items.

4.1.5.5 Contractor shall work with government property staff to develop and track software assets. Process shall include authorization signatures and paper trail throughout asset lifecycle. Contractor shall, where possible, utilize existing SNR software to develop asset tracking processes and reports. Contractor shall develop processes to manage software licenses that adhere to Presidential Executive Order 13103 (August 1999) on Software Piracy. See Paragraph 3.0 Applicable Documents and Appendix A for list of software. Number of individual software licenses will be provided upon award of contract.

4.1.5.6 Contractor shall provide assistance in surplus and disposal of software following WAPA Policy for media sanitation and disposal policy. See Section 3.0 for Applicable Documents.

#### 4.1.6 Duplicating Services

4.1.6.1 The Contractor personnel shall manage the copier/duplicating machine and serve as a focal point in copying documents in the Duplicating area. The Contractor shall perform maintenance, cleaning, and minor repair functions and initiate service requests as required. The Contractor shall produce mass duplicating, laminate, cut and staple, make labels and tables for binders.

4.1.6.2 Within timeframes established by the requestor, process reproduction requests following established regulations and policies. Perform all major reproduction runs and distributions. Large duplication processes shall be in the most cost effective and efficient manner and cost comparison for outsourcing should be considered. Submit requisitions for reproduction supplies for Government purchasing action to the COR. Track and make monthly reports concerning amount of copies made within SNR offices.

#### 4.1.7 Mailroom

4.1.7.1 Contractor shall be responsible to sort and deliver outgoing and incoming mail within the 114 Parkshore Drive, Folsom Office complex. The Contractor shall be responsible for the safe handling and review of all incoming mail and packages in accordance with security directives from the Department of Homeland Security, US DOE, US Postal Service, GSA, and Federal and local regulations and directives. The Contractor shall not open incoming mail of personnel in sensitive envelopes (blue), from the Office of Personnel Management (OPM), any attorney's office, and/or any mail labeled as personal or confidential. Mail room responsibilities include processing certified, express, overnight mail, return receipt, faxes, and tracing lost packages. Picks up, receives and sorts/distributes

internal mail received to the appropriate inboxes and/or individuals. Date stamps invoices and other mail upon receipt. Processes outgoing letters and memorandums, paying strict attention to specific instructions for each piece of correspondence, making sure that all enclosures and attachments are properly included and bcc's and cc's are sent to the designated code. Outgoing mail is labeled, sorted and processed. Periodic reports submitted to CSO on Mailroom activity conforms to established requirements and time lines.

#### 4.1.8 Supply Room.

4.1.8.1 Contractor shall be responsible for maintaining Folsom Office supply storeroom. Stock will be maintained in a neat, clean, and orderly manner. The Contractor shall maintain appropriate stock amounts for use by SNR personnel and shall restock and distribute toner and paper supplies throughout the Folsom Office. The Contractor shall be responsible to deliver and replace toner cartridges in the leased copy machines located throughout the Folsom facility. All other issues regarding these machines and all other problems with printers and copy machines are the responsibility of the Government or the IT Help Desk. The majority of stock will be stored at the EMF. However, close coordination must occur in order to keep an adequate supply on hand at all times. Upon receipt of "Request for Office Supplies," Contractor will make recommended purchase request through General Services Administration to the COR or Purchase Agent and distribute new supplies.

#### 4.2 **Administrative Assistant Support**

Contractor shall provide direct administrative assistance to SNR Program Support & Power Marketing. Administrative assistants must be proficient at an intermediate-to-advanced level in the use of standard office equipment, MS Word and MS excel. The contractor is required, on an on-going basis to perform the clerical duties outlined in sections 4.1 through 4.1.6.2 as previously described. Other administrative duties include:

- 4.2.1 Intra-office mail—sort and distribute intra-office mail within organization supported. This includes making/routing copies, creation of suspense files, maintaining certified mail controls/receipts. Assures a final review of outgoing mail for completeness (i.e., accuracy, proper format, compliance with requirements, attachments, dates, signature, addresses, etc.) and in consistence with the guidelines of the office, advises of any deviations or inadequacies.
- 4.2.2 Calendar Management--schedules, reschedules, or cancels individual appointments and conferences in order to meet organizational commitments or cover priority subjects.
- 4.2.3 Meetings/Conferences--Arranges (or assists with arranging) conferences, large meetings, and makes all arrangements, including travel, space, time, equipment, and agenda. Gathers and assembles required documents and materials such as speeches, reports, overheads, and handouts for conferences and meetings. Attends and records the minutes at various meetings which are later summarized and distributed. Develops action items/suspense dates to monitor that commitments made at the meetings are met.
- 4.2.4 Federal Time and Attendance--Use Western's automated time and attendance system to record, review, and correct time and attendance (T&A) for Federal employees. Oversees

corrections, ensures appropriate supporting documentation is complete, and finalizes the package for submission and review to the region's finance office each pay period. Ensures corrections are made to previous time and attendance sheets.

- 4.2.5 Training—Make all arrangements for training. This includes obtaining necessary approvals, scheduling, and/or registering employees to attend off site training and complete appropriate training forms as needed in accordance with established procedures.
- 4.2.6 Federal Travel—In accordance with federal travel regulations and Western guidance uses federal travel systems and government travel card to make travel, training, and hotel arrangements and reservations for federal personnel, ensuring that reservations and advances of funds are received in time. Prepares and maintains detailed itinerary of trip. Reviews completed vouchers prior to approval for payment.
- 4.2.7 Purchase Requests—Uses Westerns automated system to enter purchase requests for the purpose of ordering office supplies, training and miscellaneous services.
- 4.2.8 Create, modify and use electronic spreadsheets and Western's automated systems, to assist in the development, analysis and tracking of a variety of financial, budget, purchasing and/or program management transactions.
- 4.2.9 Establishes, maintains, and terminates as necessary office files and records. Adds or revises files to meet current needs and demands for the material.
- 4.2.10 Assist personnel with the proper use of office equipment and place maintenance and/or service calls as scheduled or required.

#### 4.3 **Lands Support.**

##### 4.3.1 Realty Technician

Contractor shall assist SNR Lands Personnel and the Program support office in the preparation and completion of negotiated agreements from inception to completion. Work performed is routine administrative or technical support typically performed in an office environment. Because lands personnel must interact with customers and individual residents affected by Western's rights of way assistance shall be required in a field setting. The work performed shall be in accordance with the Lands Process Book. Contractor will be proficient in the use of normal office equipment, phones, fax machines, microfiche readers, typewriters, filing systems and standard word processing and spreadsheet applications to perform the following types of duties:

- 4.3.1.1 Enter and track the progress of purchase requisitions in preparation for landowner settlements and/or to initiate purchases for training or other services and supplies
- 4.3.1.2 Research lands agreements, contracts, deed restrictions, landowner information, land-use, license agreements, and other related information as necessary
- 4.3.1.3 Read, review and interpret maps and/or GIS information sufficient to identify and plot SNR rights-of-way, proposed transmission projects rights of way
- 4.3.1.4 Read, review and interpret plan and profile, other engineering drawings and proposed improvement plans
- 4.3.1.5 Compose and/or edit letters

- 4.3.1.6 Maintain Encroachment and other Reports in accordance with established formats or requirements specified
- 4.3.1.7 Research information in support of License agreements
- 4.3.1.8 Contact Landowners
- 4.3.1.9 Research title histories; Title Reports; review Title Insurance
- 4.3.1.10 Maintain and update landowner, lands, project, and microfiche files
- 4.3.1.11 Perform data entry into the Real Estate Information System (REIS)
- 4.3.1.12 Review, update and monitor the Transmission Asset Management Information Systems (TAMIS). Includes weekly review of entries and report new encroachments, vegetation or access issues to Realty Specialist for resolution.
- 4.3.1.13 Maintain computerized listing of trimming areas.
- 4.3.1.14 Prepare letters, memorandums, contracts, license agreements, and other word processing documents as necessary to support the lands department.
- 4.3.1.15 Assist Realty Specialists in a field setting
- 4.3.1.16 Assist in the preparation of damage estimates
- 4.3.1.17 Assist other Program Support functions with miscellaneous clerical duties, such as filing, drafting letters, entering purchase requisitions, and issuing standard reports etc.

#### 4.4 **Purchasing Assistant**

- 4.4.1 Prepares files and documents for the purchase of supplies, equipment and services for SNR, including common use, technical and specialized items and performs file and computer system reviews to prepare response for requests for information from within Western. Major duties include the following:
- 4.4.2 Responsible for limited pre and post award procurement functions on a wide variety of service, supply, construction and/or equipment contracts which may extend over several years and/or cover long periods of manufacturer or extended period of operation.
- 4.4.3 Analyzes requirements and recommends appropriate contract type and acquisition methodology to be employed; develops milestones and/or develops all required justification, clearances, and determinations and finds for the CO approval,
- 4.4.4 Prepares solicitation documents. Selects appropriate clauses and develops specialized terms and conditions, ensures clear and complete specifications, and serves as the central point of contact to respond to inquiries on assigned procurement actions.
- 4.4.5 Evaluate bids/proposals for technical adequacy performs cost and/or price analyses; develops pre-negotiation positions for CO's review and approval; conducts negotiations on technical/cost issues and /or contract terms' prepares pre-award clearances and approvals; and recommends award to CO.

- 4.4.6 Monitors contractor performance and assists CO in administration of contracts. Interprets contract provisions, recommends schedule and other changes, and prepares modifications and associate document for CO review and approval. Prepares documentation and file for contract close-out actions.
- 4.4.7 Assists technical and professional personnel in the development of specifications and sole source justifications. Furnishes specifications and/or other descriptive data which reflect the intent of the specific procurements so that the contractor may have the proper concept of the equipment, supply, system and/or service.
- 4.4.8 Initiates necessary actions to trace shipments, expedited deliveries, and affect adjustments. Provides CO with all research/documentation to take necessary action to rectify discrepancies such as shortages or damaged items on incoming shipments.
- 4.4.9 Performs file, records and system research to gather procurement related data for responses to inquiries within Western and SNR.
- 4.5 **Environmental Services.** Environmental Administrative Support (EAS)
  - 4.5.1 Provides administrative support to SNR Natural Resources Department consisting of the Integrated Vegetation Management Program, Geographic Information System Program, Environmental Planning Program, and Environmental Compliance Program. Shall be proficient with word processing software, accessories, typewriters, and other administrative software.
  - 4.5.2 The EAS shall be responsible for managing and overseeing a total work effort that will furnish all personnel supervision, services, equipment, and supplies, as specified, and to perform administrative services. As workload needs and/or requirements change, the contractor shall assure that the EAS is appropriately cross-trained so that key procedures and duties will continue to be supported
  - 4.5.3 The work performed shall be IAW the EAS Process Book(s).
  - 4.5.4 The tasks and responsibilities of this function include, but are not restricted or limited to the following:
    - 4.5.4.1 In accordance with established federal rules and regulations and Western policies and procedures, establishes, maintains, and terminates as necessary all office files and records. Adds or revises files to meet current needs and demands for the material.
    - 4.5.4.2 Schedules and attends various meetings and records, summarizes and distributes the minutes. To insure commitments made at meetings are met, coordinates follow-through with appropriate personnel.
    - 4.5.4.3 Routine clerical responsibilities, document preparation, and Team Track or heat ticket requests, and/or filing.
    - 4.5.4.4 Calendar Management; schedules, reschedules, or cancels individual appointments and conferences in order to meet organizational commitments or cover priority subjects.

- 4.5.4.5 Meetings/Conferences; Arranges (or assists with arranging) conferences, large meetings, and makes all arrangements including travel, space, time, equipment, and agenda. Gathers and assembles required documents and materials such as speeches, reports, overheads, and handouts for conferences and meetings. Attends and records the minutes at various meetings which later are summarized and distributed. Develops action items/suspense dates to monitor that commitments made at the meetings are met.
- 4.5.4.6 Training: Makes all (or assists with arranging) arrangements for training. This includes obtaining necessary approvals, scheduling, and/or registering employees to attend off site training and complete appropriate training forms as needed in accordance with established procedures.
- 4.5.4.7 Uses various computer applications in order to develop, store, retrieve, manipulate, validate, transfer, compute and/or print information such as e-mail, appointments, letters, memos, textual documents, graphics, reports, spreadsheets, and various purchasing/budgeting documents.
- 4.5.4.8 Serves as the focal point for the Natural Resources Department records management function for SNR; shall maintain files in an organized manner so that needed records can be found rapidly, complete records are assured, and the selection and disposition of obsolete records are accomplished following prescribed procedures.
- 4.5.4.9 Prepare in final form utilizing the above software, from draft or handwritten material a variety of documents including, but not limited to, letters, memorandums, forms, reports, studies, vacancy announcements, position descriptions, specifications, legal documents, contracts, presentations, spreadsheets, and directives.
- 4.5.4.9.1 All typing shall be in conformance with: Government Printing Office Style Manual, Western Correspondence Guide, and the Gregg Reference Manual. Review documents prior to finalizing for typographical errors, spelling, grammar, punctuation, format, and arrangement of materials, and adhere to rules governing spelling, grammar, punctuation, and the standard formats used by Western. Pay strict attention to specific instructions for processing each document including appropriate enclosures, attachments, courtesy copies (cc), and blind courtesy copies (bcc).
- 4.5.4.9.2 Distribute and mail signed documents. Create and automate various forms.
- 4.5.4.9.3 Post necessary documents to organization's webpage and/or read file and update as necessary.



- 4.5.4.9.4 Purchase Requests-Uses Western's automated system to enter purchase requests for the purpose of ordering office supplies, training and miscellaneous services; maintain, track, and renew maintenance and other agreements.

4.6 **Environmental Compliance Specialist.** The Contractor shall initiate and complete the following type of tasks in the environmental compliance field as requested:

- 4.6.1 Provides technical expertise and assistance as needed in the identification, planning, review, and execution of site investigations, sampling/lab analysis, documentation maintenance, and remediation plans to remove any hazardous and/or toxic wastes on SNR owned or operated property in accordance with all applicable Federal, State, and local environmental laws.
- 4.6.2 Interprets and assists in preparing appropriate guidelines for the use, storage, handling, and disposal of hazardous materials and chemicals used by Western employees and/or contractors in accordance with Federal, State, and local environmental requirements.
- 4.6.3 Interprets and assists with the pollution prevention program and goals.
- 4.6.4 Conducts audits and appraisals to measure and evaluate environmental conditions at facilities and develops remedial measures to comply with audit findings.
- 4.6.5 Reviews and prepares guidance for Western's engineering, operation and maintenance, construction plans, specifications, and operating procedures, to ensure that environmental requirements are incorporated.
- 4.6.6 Coordinates and communicates compliance activities with representatives of private and public agencies.
- 4.6.7 Reviews existing, proposed, and new regulations in the environmental compliance field to determine their applicability and develops methodologies for solving the problem.
- 4.6.8 Provides support by acquiring required permits under Federal, State, and local law.
- 4.6.9 Responds to and provides technical consultation in the event of spills or other incidents. Evaluates the extent of the problem and develops methodologies for solving the problem.
- 4.6.10 The Contractor shall use computer and filing systems to track the above mentioned tasks.
- 4.6.11 Educates users in the latest procedures, guidelines, and/or regulations IAW all applicable Federal and State laws.
- 4.6.12 As workload needs and/or requirements change, the contractor shall assure that the Environmental Compliance Specialist is appropriately cross-trained so that key procedures and duties will continue to be supported.

4.7 **Geographic Information Systems (GIS) Specialist.** Contractor shall be the lead in providing Geographic Information Services (GIS) using appropriate software/hardware to support Western's GIS program.

- 4.7.1 Shall provide responsive and proactive technical support and research, cartographic products, spatial database design, management, analysis and support, web designing,

aerial imagery rectification and analysis, lidar analysis/reporting and field data collection using Global Positioning technology (GPS) to include but not limited to: Trimble hardware and Pathfinder Office software, CAD to GIS conversion, technical documentation, technical advice and support to customers and program managers, and develop and present staff/crew training. Responsive technical support is defined as responding to the customer's requests within 24 hrs with a solution or definition of final delivery date that is mutually agreed upon.

- 4.7.2 Shall use additional GIS software packages that include but are not limited to: GlobeExplorer, Global Mapper, Pathfinder Office, LinearVision Viewer, Map Server, and other applications that support the GIS program. Shall provide support to install and configure all GIS/GPS related software to other GIS users and internal clients.
- 4.7.3 Shall develop and maintain quality and accuracy within the GIS Program and provide above average customer support for all SNR employees.
- 4.7.4 Ensure Data layers/data elements are consistent with the existing standards.
- 4.7.5 Develop, document, and ensure that GIS procedures are implemented.
- 4.7.6 Maintain prototype GIS products and prepare quality cartographic maps.
- 4.7.7 Maintain Government furnished software and hardware.
- 4.7.8 Update and maintain orthophotography, video and other raster imagery for Western's GIS database.
- 4.7.9 Develop annual budgets and reports, prepare training sessions and ensure upkeep of the GIS Process Book.
- 4.7.10 Coordinate the production, maintenance and scheduling of the geographical information in conjunction with all other land based systems and/or files and programs in Western.
- 4.7.11 Research, evaluate, develop, maintain and recommend acquisition of computer hardware and software necessary to implement Western's geographical information system.
- 4.7.12 Plan, document, and coordinate the administration and scheduling of all data layers exchanges by agreement documents or MOU's.
- 4.7.13 Perform digitizing and drafting as required.
- 4.7.14 Train users in the use of GIS and related software, workstations, printers and plotters, digitizing tablets and tables, and GIS networking systems.
- 4.7.15 Provide a field support presence in support of the GIS networking and mapping system and adhere to all prescribed safety requirements.
- 4.7.16 As workload needs and/or requirements change, the contractor shall assure that the GIS Specialist is appropriately cross-trained so that key procedures and duties will continue to be supported.

#### 4.8 **Settlements and Power Billing Accounting and Analysis Support**

- 4.8.1 The Contractor shall be responsible for providing accounting and analyses and services as required to support SNR Settlement and Power billing staff in processing and analyzing California Independent Operator Settlements, performing energy accounting and

reconciliation and creation of Western's power bills. The Contractor is required to prepare and have available a business process document to aid in the performance of Contractor requirements. The Contractor shall attend settlement staff meetings to discuss outstanding issues and applicable assignments. The Contractor shall ensure that SNR has received Settlement quality data to validate, reconcile, and prepare statements for Western within the 98% Settlement Quality Data industry standard.

- 4.8.2 Contractor shall extract data from CAISO consistent with the CAISO protocols and Payment Calendar, which reflects publication dates of both settlement statements and invoices. If the publication of settlements and/or invoices has not met the ISO's protocol, the Contractor shall contact either the CAISO to verify if publication is delayed and/or contact SNR Information Technology (IT) to determine if an anomaly occurred locally and inform appropriate government personnel.
- 4.8.3 If after extracting data or reviewing data that has been submitted to the CAISO does not meet standards, the Contractor shall obtain direction from the Settlement Team Lead or a designated SNR federal employee.
- 4.8.4 Transmission of data from the CAISO to Western is seamless and has been formatted to meet Western's requirements. At this time it does not require a change in the procedure. However, the CAISO policy on line retrieval is rigid and data will be removed within a minimum of 7 days depending on the event or type.
- 4.8.5 Reports are prepared and maintained daily, weekly, or monthly depending on the event. Contractor shall process all routine extraction from the CAISO daily. Contractor shall also process all routine data extracted from sources other than the CAISO.
- 4.8.6 The Contractor shall be expected to extract data from sources other than CAISO. The Contractor shall be required to communicate with the data source for parameters and availability for obtaining information. The Contractor shall relate to the Settlement Team Lead or SNR federal employee that all resources have been exhausted if parameters cannot be fulfilled.
- 4.8.7 The Contractor must train and comply for Standards of Conduct certification, a FERC requirement for Power Marketing, and all other applicable training required for Power Marketing or SNR.
- 4.8.8 The tasks include, but are not necessarily restricted or limited to the following settlement functions:
  - 4.8.8.1 Garner and review data for consistency and accuracy; identify data discrepancies or deviations and resolve or recommend resolution to Settlements Lead.
  - 4.8.8.2 Validate results of data.
  - 4.8.8.3 Recommend modification of data and assumptions as necessary.
  - 4.8.8.4 Utilize existing commercially available programs as well as licensed proprietary software applications.
  - 4.8.8.5 The collection of data to include, but not limited to the CAISO settlement statement components:
  - 4.8.8.6 Review this data for consistency and accuracy.

- 4.8.8.7 Validate data between internal and external resources.
- 4.8.8.8 Identify problem areas.
- 4.8.8.9 Develop complex reports and solutions. This requires advanced skill levels in excel.
- 4.8.8.10 Assist in the review of batch processes for validation of meter, schedule, and pricing information.
- 4.8.8.11 Assist in identifying errors and recommend alternative solutions.
- 4.8.8.12 Research, prepare and provide other analytical reports to be used for external and internal reporting as applicable.
- 4.8.8.13 Review and update processes as required by changes in business practices imposed by Western, SNR, or CAISO.
- 4.8.8.14 Assist in responding to internal/external audits.
- 4.8.8.15 Ad-hoc queries may require immediate attention or may have a specific due date. The Contractor shall determine task priorities in order to satisfy customer needs. Ad-hoc assignments include but are not restricted to the following:
- 4.8.8.16 Assist in the research and preparation of informational reports as necessary.
- 4.8.8.17 Assist Settlement Analyst as necessary.

4.9 **Power Marketing and Business Process Analyst.** Contractor shall interact with Power Marketing managerial and technical staff to analyze, identify, and automate business processes and procedures in the areas of scheduling, pre-scheduling, resources, power billing, settlements, energy accounting, and the interrogation, acquisition, storage, and use of all SNR meters. The purpose of these interactions include, but are not necessarily limited to the development of automated business queries, data mining and analyses, assisting functional users develop, prepare, and document business requirements/business process flows and making recommendations to IT regarding data architecture and data schemas with respect to all of the business applications/software used by the Power Marketing unit. In performing these duties, the Contractor shall be expected to use a variety of tools and analytical techniques appropriate to each business situation

- 4.9.1 The Contractor shall be responsible for assisting Power Marketing staff identify, analyze, and automate/implement the business processes and procedures prioritized and designated by the Power Marketing Manager as being critical. These critical business processes/procedures are currently being performed manually and include but are not necessarily limited to: scheduling and pre-scheduling processes and protocols; the acquisition, analysis, and the pass through of metering (i.e., energy accounting), power billing, and settlements data to downstream financial management systems, resources planning and analysis.
- 4.9.2 The Contractor shall develop, automate, and deploy the necessary queries to Power Marketing staff to enable them to perform data mining activities associated with the analysis and verification that information transferred from the SNR's Power Marketing

systems are accurate and that they are transferred accurately to downstream systems such as power billing, energy settlements, and other financial management systems. Contractor shall also assure that data provided by SNR's Power Operations unit business applications, preference power and transmission system customers, and the California Independent System Operator is complete, appropriate, and capable of being certified as being correct.

- 4.9.3 The Contractor shall assist Power Marketing staff develop, analyze, and diagram business process flows, processes, and protocols as requested with the expectation of developing business requirements which would then be used to either initiate process improvements and/or develop automated solutions for business processes/protocols which are currently being performed manually. As part of this effort, Contractor is expected to provide technical analysis and support with respect to how the proposed technology solution will be integrated into SNR's Enterprise Application Interface IT infrastructure, and will affect SNR's business systems.
- 4.9.4 Contractor shall attend any and all meetings as required by COR and serve as a liaison between SNR's IT department and the Power Marketing staff.
- 4.9.5 Contractor shall provide project oversight and related services as requested. As part of these duties, Contractor shall monitor the progress and status of any IT systems development designs and implementations, track software systems development, assess the risks of ongoing software development and coding, and perform earned value management as needed.
- 4.10 **Finance and Accounting Support.** The Contractor shall be responsible for providing technical financial analysis services in addition to routine monthly services in the area of finance and accounting. The tasks and responsibilities of this function include, but are not restricted or limited to the following:
  - 4.10.1 **Accounting Technicians: Accounts Payable & Accounts Receivable**
    - 4.10.1.1 Coordinates the Power billing function for SNR Finance Division. Works directly with other SNR divisions to ensure accurate and timely delivery of billing information to all SNR power customers. Collects data from internal and external customers to calculate late payment charges and determine credits, withdrawals, and adjustments for a variety of Power Billing accounts and functions. Researches and responds to inquiries from internal or external customers regarding power billing functions. Performs collection activities to include continuous monitoring of outstanding accounts receivables, performs agings of accounts receivables, prepares dunning letters, and makes inquiries with customers on the status of outstanding accounts receivables in accordance with the Debt Collections Improvement Act. Duties also include contacting customers as needed to resolve issues/concerns and maintaining financial files according to directives. Assists senior accountant(s) in reviewing the power bills and other power accounting data for the appropriate cost structures and charging patterns. Monitors these reports and systems and ensures corrections are made.

- 4.10.1.2 Receives and reviews invoices, statements, and acknowledgments. Examines and verifies information for accuracy against source documents and supporting files. Matches invoices with purchasing documents, receiving reports, and acceptance reports. Determines accounts involved, codes transactions, and processes invoices for payment. Ensures timely submission to CSO Finance in compliance with the Prompt Payment Act. Duties also include contacting vendors as needed to resolve issues/concerns and maintaining financial files according to directives.
- 4.10.1.3 Serves as the SNR point of contact for all miscellaneous reimbursement matters. Processes miscellaneous claims for reimbursement of employees' eye exams, physical exams, health club fees, and safety equipment (e.g., work boots, safety glasses, etc.), complying with pertinent rules and regulations. Notifies administrative technicians of changes that affect miscellaneous reimbursements.
- 4.10.1.4 Performs year-end processes as related to primary duties (accounts payables and accounts receivables).
- 4.10.1.5 Interprets and applies many rules, regulations, and procedures such as US Department of Treasury regulations (Treasury Manual, bulletins, and transmittals), General Service Administration's Federal Travel Regulations, General Accounting Office regulations, Controller General Decisions, Debt Collections Improvement Act, Prompt Payment Act and procurement regulations. The interpretation and applications are used in the examination process and are the basis for sound judgment in making decisions as to the legality and accuracy of payment vouchers, bills for collection and inter-governmental documents.
- 4.10.1.6 Assists with review of monthly financial reports, as required by supervisor, in order to compile data relative to status of funds and to verify entry of accounting information.
- 4.10.1.7 Maintains working files of the BIDSS accounting reports necessary for financial management. Reviews the unliquidated obligations, accounts payable, and accounts receivable data for overdue and outstanding balances and follows up to resolve them.
- 4.10.1.8 Assists, as required, with the computer input of a variety of financial system data.
- 4.10.1.9 Performs other routine and recurring assignments as required to accomplish Regional budget and finance functions.
- 4.10.1.10 Performs other miscellaneous duties as may be required in achieving proper accomplishment of SNR accounting functions. Such duties may include researching and resolving discrepancies in a variety of reports, and assisting higher level staff in data gathering, compilation and computations.

- 4.11 **Facility Management Support** The Contractor shall perform the following work predominantly at the SNR facility in Folsom. Infrequent work may need to be performed at other SNR facilities. Occasional week-end work shall be required in order to escort contractors or perform work that cannot reasonably be done during normal hours. It is anticipated that week-end work shall be managed with schedule pre-planning; changing a previous week's work schedule to allow for a day off during the week. Work involved is typically of commercial maintenance and operations duties and includes, but is not necessarily limited to the following:
- 4.11.1 Preventative maintenance work: Perform preventative maintenance on the building operating equipment in accordance with the planned preventative maintenance program. Work shall be performed in accordance with the preventative maintenance program requirements and the equipment manufacturer's recommendations and the best practices of the trade. Work is to be performed within the scheduled time frames set out in the preventative maintenance program.
  - 4.11.2 Equipment tours and operations: Perform mechanical inspection tours of all building operating equipment as scheduled in the preventative maintenance program. The contractor will have his tool pouch with him during the tours so that he can make spot repairs as he finds them. Non-critical repairs that take longer than ½ hour should be written down and turned into service calls to be attended to as they can be scheduled.
  - 4.11.3 Facility and equipment repairs: Perform necessary repairs to the buildings architectural, mechanical, electrical, plumbing, and HVAC systems as they are identified. Repairs are to be performed in accordance with applicable codes and standards and in accordance with the best practices of the trade and in a workman like manner.
  - 4.11.4 Facility housekeeping: The mechanic will be responsible for keeping all mechanical equipment and spaces clean, neat, and picked up at all times. These spaces include the chiller enclosure, rooftops, mechanical mezzanine boiler room and storage shed. Examples of cleaning would be to keep the roofs and chiller enclosure clear of leaves and debris, wiping up grease and dirt on all mechanical equipment, emptying trash cans in the shop, and keeping the chillers and emergency generator washed down and clean.
  - 4.11.5 Service call response: Monitor the WAPA Team Track electronic service call program daily looking for service call requests that have been assigned to the facility maintenance contractor. Review the assigned service calls and prioritize them by order of importance. If questions of prioritization occur consult with the Facility Manager for direction. Service calls are to be responded to within the same day they are received. Service calls for repairs should be completed the same day unless the necessary parts are not available. Some non emergency service calls may not need to be completed the day received if the work load for higher priority service calls does not allow however an email, phone call, or personal contact with the originator of the service call must be made the day the call is entered. Promptly electronically close out service calls in the system when they are completed.
  - 4.11.6 Modular furniture reconfiguration: Perform modular furniture reconfigurations as required. Requests for reconfigurations are to be approved by the Facility Manager prior to being performed. The contractor is to maintain an inventory of the spare furniture parts on hand. If parts are needed for a reconfiguration the contractor shall develop a detailed list of the parts needed to be purchased to complete the reconfiguration and turn that list over to the Facility Manager for purchase.

- 4.11.7 **Miscellaneous services:** These tasks include but are not limited to setting up conference room furniture, escorting other contractors performing work in the facility, supporting special events at the facility, performing necessary housekeeping duties to ensure mechanical spaces are kept clean, neat, and in an orderly condition, maintaining control of tools and supplies. Keeping an inventory of expendable supplies and requesting replacement supplies from the Facility Manager prior to running out of supplies. Example of supplies would be light bulbs, ballasts, rags, grease, plumbing parts, etc.
- 4.11.8 **Property control:** The Contractor employee(s) performing these duties will be provided the necessary tools for the work of the position. Tools are to be maintained in an orderly fashion and in good condition. Tools that are worn or unsafe are to be turned in for replacement. Tools are to be controlled and not left lying about.
- 4.11.9 **Safety:** The Contractor employee(s) will adhere to all safety requirements in performing tasks assigned to include donning appropriate safety gear and clothing.
- 4.12 **Maintenance Management Technician** Contractor supports the management and systems for planning and scheduling of Maintenance work. Coordinates with maintenance staff in the development of the region's maintenance program to meet regional goals, reliability standards compliance, and objectives. Reviews, analyzes, and corrects data in the Transmission Asset Management Information Systems (TAMIS). This includes initiating request for summary reports, gathering information from the field.
  - 4.12.1 **Technical Support and Training on Computer Management Maintenance System (CMMS), TAMIS and Other Maintenance software** – Provides analysis and guidance on the use of the Region's CMMS. Provides user assistance in interpreting business rules and in setting up equipment records, preventative maintenance schedules, task descriptions, and work orders. Administers and troubleshoots maintenance related software databases, provides problem resolution, and technical training on CMMS, TAMIS and other maintenance software. Stays abreast of industry developments in maintenance management technology and keeps management informed. Provides guidance for establishing best practices for gathering and archiving critical equipment maintenance data. Investigates new or improved business practices for application maintenance programs or operations. Plans, develops, schedules, and presents training on CMMS and other maintenance software applications for the region.
  - 4.12.2 **Administrative Technical Support** – Assists in initiating, preparing, and maintaining various technical documents. Prepares purchase requests for a variety of electrical equipment, maintenance equipment, materials and services. Prepare purchase orders, and schedules. Initiates procurement actions to purchase equipment for the Maintenance offices.
  - 4.12.3 **Audits CMMS and TAMIS Data for Accuracy and Completeness** – Performs periodic audits of CMMS data to ensure compliance with established business rules; accuracy of regional asset catalog (equipment specifications), and to assess training needs for craft, engineering or management personnel on appropriate use of CMMS software applications. Provides guidance for establishing best approach for labor and cost tracking and management in CMMS for capital and replacement projects. Develops project-reporting tools for project managers and verifies project documentation for completeness. Coordinates project completion documentation among work force, project manager, and



regional accounting office. Works with Finance and Accounting personnel to assure that all trust and capitalized project costs are identified and transferred to plant.

#### 4.13 **Safety and Security Support**

##### 4.13.1 **Safety and Security Technician**

- 4.13.1.1 Provide technical support work as an integral part of the Safety and Security Office, providing safety and security information and administrative support for varying programs within the function. Individual shall be proficient with word processing software programs and assisting in administrative support duties. Individual will also participate and support field duties as required and other associated support functions within the Safety and Security Office.
- 4.13.1.2 Support the SNR Safety and Security Office and organization in tasks and responsibilities that include but are not limited to:
  - 4.13.1.2.1 Assist the Safety & Security Manager and other assigned personnel within the function with required safety and security training duties and courses for SNR and/or Western personnel. Training courses could include safety requirements such as CPR/First Aid/AED, health and safety topics, security topics, fire prevention, ergonomics and other associated occupational safety requirements. Individual will assist in the preparation, presentation and recording of such training.
  - 4.13.1.2.2 Participate and help coordinate annual safety and security audits and inspections. This includes field and office visits, reviewing locations, ascertaining safety and security needs for regulatory and industry standards, recording any deficiencies, working toward corrective actions and reporting findings.
  - 4.13.1.2.3 Assist in researching and fielding regulatory questions and support for Federal OSHA, California State OSHA, NFPA, Western and other technical information for safety and security.
  - 4.13.1.2.4 Support and administer the filing and record keeping system, technical library, Material Data Safety Sheets (MSDS), security program documentation, training records and other associated documentation. Files and records are maintained in accordance with established federal rules and regulations and Western policies and procedures. All files and records are established, maintained, and archived, and/or destroyed per established guidelines and cutoff dates for files and records. Adds or revises files to meet current needs and demands for the material.
  - 4.13.1.2.5 Assist in coordinating and supporting the region's security program in terms of physical access, issuing and retrieving identification and badging information, supporting background and access checks on employees and visitors. Assists Safety and Security Manager, Security Specialist and other members of team in providing administrative

support to the organization's internal facility security program.

- 4.13.1.2.6 Responsible for establishing, updating and maintaining current regulatory manuals and technical references.
- 4.13.1.2.7 Assist in maintaining data for incident and injury reports, trending analysis and maintaining documentation files for accidents and incidents.
- 4.13.1.2.8 Provide support to the organization's motor vehicle safety program by following up on state motor vehicle safety requirements and regulations for both commercial and government vehicle operators.
- 4.13.1.2.9 Assist the Safety team in field visits and functional support to office, craft and maintenance personnel in terms of safety and security support.
- 4.13.1.2.10 Support the organization's safety committee and other safety and security meeting venues. Assists with preparation of meeting mechanics, takes notes and publishes notes and slides.
- 4.13.1.2.11 Utilize various computer applications in order to develop, store, retrieve, manipulate, validate, transfer, compute and/or print information such as e-mail, appointments, letters, memos, documents, graphics, reports, spreadsheets, and various purchasing documents.
- 4.13.1.2.12 Update the Safety and Security web page adding current/new information.
- 4.13.1.2.13 Assist in planning and coordinating emergency evacuations, drills, contingency and continuity of operations requirements and planning.
- 4.13.1.2.14 Provide in-briefing and out-briefings for safety and security orientations for new employees and assisting in the follow-up of employees, visitors who have left the organization.
- 4.13.1.2.15 Maintain necessary confidentiality and personal security for sensitive materials, information, and situations.

#### 4.14 **Warehousing & Vehicle Maintenance Services**

- 4.14.1 **Warehousing Services.** The Contractor shall operate and maintain the warehouse facilities located at the Elverta Maintenance Facility (EMF). Unmanned warehouse and storage facilities also exist at Olinda Substation, Maxwell Substation, Redding Maintenance Facility (RMF), Tracy Maintenance Facility (TMF), and Los Banos Supply Yard, which the Contractor shall be responsible for maintaining. The five warehouse/yard facilities have approximately 27,400 square feet of indoor storage and

300,900 square feet of outdoor storage. The estimated quantity and value of items in the warehouse inventory are respectively 3,600 items and \$1,300,000. The work shall be performed by on-site warehousepersons.

- 4.14.1.1.1 All operations will be carried out in accordance with procedures and written policy guidelines of the Federal Property Management Regulations (FPMR) and appropriate Department of Transportation, Environmental Protection Agency, DOE and Western guidelines.
- 4.14.1.1.2 Conduct annual physical inventories of all warehouse supplies and materials. Inventories will be accomplished following DOE and FPMR and Western procedures. Inventory reports will be submitted to COR for approval and tracking. Requisitions for replenishment of the warehouse stock will be submitted to the Property Management Officer (PMO) for approval.
- 4.14.1.1.3 Contractor may be responsible for warehouse losses. Contractor is allowed  $\frac{1}{2}$  of 1 percent of total gross business (results of receipt and issues) in losses per annum. This applies to both write-offs and write-ons. Losses exceeding the above amount will be presented to the Administrative Officer, investigated and findings will be forwarded to the Regional Manager for determination. If a contract employee is determined to be at fault the CO will affect the appropriate action to either remove the employee from Western's facilities and/or determine the Contractor's financial responsibility to the government.
- 4.14.1.1.4 Perform necessary housekeeping duties to ensure warehouse is kept clean, neat, and in an orderly and safe condition. Responsible for crating, packing, and shipping return items. Assemble knockdown items of equipment.
- 4.14.1.1.5 Additional work involved is typical of normal warehouse operations and includes, but is not necessarily limited to the following:
  - 4.14.1.1.5.1 Inspect, count, and segregate stock items according to stock classification, nomenclature, and location.
  - 4.14.1.1.5.2 Establish, post, and maintain stock records on computer.
  - 4.14.1.1.5.3 Audit stock records, perform special, cyclical and physical inventories, and propose adjustment reports to convert stock records.
  - 4.14.1.1.5.4 Track outstanding shipments and notify the PMO.
  - 4.14.1.1.5.5 Reconcile shipped/received items to the original Purchase Order and verify performance of items received. Note discrepancies to the PMO.
  - 4.14.1.1.5.6 Prepare and file correspondence as requested.

- 4.14.1.1.5.7 Identify, inspect, count, track and make hand tallies of incoming and outgoing supplies and follows up on over/short shipments.
- 4.14.1.1.5.8 Select and issue stock to fill requisitions, and spot check outgoing shipments to assure content, quantity, and markings.
- 4.14.1.1.5.9 Store supply items according to classification, nomenclature, and location.
- 4.14.1.1.5.10 Establish and maintain storage plan, stock location system, and operate the computer terminal for stock identification.
- 4.14.1.1.5.11 Operate office machines (calculator, computer terminal or personal computer and other equipment as needed to complete the job.
- 4.14.1.1.5.12 Operate Government-owned/provided vehicles, to include forklifts, utility trucks, and other assigned motor vehicles on a daily basis to include preventative maintenance service.
- 4.14.1.1.5.13 Follow-up on orders to ensure timely delivery.
- 4.14.1.1.5.14 Prepare shipments for outgoing freight utilizing commercial tracking firms. Shipments may vary in size from one cardboard box to a full truckload. The contractor shall provide shipping reports/documentation as agreed upon by the PMO and/or COR.
- 4.14.1.1.5.15 Deliver, move, and/or pick up equipment, supplies, and other miscellaneous materials as needed.
- 4.14.1.1.5.16 Responsible for inventory of all warehouse supplies and materials. All adjustments to inventory shall be approved by COR. Overnight travel in conjunction with physical inventory duties or deliveries of material will be required. Government-furnished vehicles shall be used to the maximum possible extent.
- 4.14.1.1.5.17 Property Management. All operations at the warehouse shall follow procedures and written policy guidelines of the FPMR and appropriate guidelines of Department of Energy (DOE) and Western, for the handling, storage, and reporting of Government property. In addition, staging, transporting, and managing warehouse items and SNR's property will be in accordance with recognized industry and safety requirements.

4.14.2 Utility/Warehousing. The Contractor shall perform the following work at any of Western's facilities but predominantly at the Elverta Maintenance Facility. Work

involved is typical of utility and warehousing operations and includes, but is not limited to the following:

- 4.14.2.1 Shipping. Prepare shipments for outgoing freight utilizing commercial trucking firms. Shipments may vary in size from one cardboard box to a full truckload. The Contractor shall be responsible for proper crating of the shipments. Materials for packaging/crating will be provided by the Government. Contractor shall provide shipping reports as agreed upon by the CO and/or COR.
- 4.14.2.2 Miscellaneous. These tasks include, but are not limited to, plastic and lettered sign making; moving, delivering, and setting up office and conference room furniture; assisting warehouse with receiving, issuing, posting, requisitioning, and inventory
- 4.14.2.3 Program Direction. All operations for the warehouse and utility work will be carried out in accordance with procedures and written policy guidelines of the FPMR and appropriate guidelines of DOE, Western, Department of Transportation, and the Environmental Protection Agency. All tasks shall be performed in a safe manner and individuals shall wear appropriate safety gear and clothing to match assigned tasks.
- 4.14.2.4 Travel. Overnight travel, in conjunction with physical inventories of field warehouses or delivery of material, may be required. Government-furnished vehicles shall be used to the maximum extent possible.
- 4.14.3 Vehicle and Equipment Maintenance. The Contractor is responsible for assuring that all government vehicles are routinely serviced and maintained. Equipment maintenance includes corrective maintenance, preventative maintenance, modifications to equipment, preparation of equipment for disposal and miscellaneous maintenance services. Maintenance services shall be conducted at SNR facilities and in the field. The equipment is located at any place within the SNR service area. The contract employee(s) shall possess the appropriate motor vehicle licensing to operate and maintain the motor vehicle and equipment assigned. There shall be one mechanic covering the North Area and located at Redding Maintenance Facility and one mechanic covering the South Area and located at Elverta Maintenance Facility.
  - 4.14.3.1 Contractor shall provide a report of maintenance conducted to the CO and COR for approval.
  - 4.14.3.2 Equipment on which maintenance shall be performed is used to support the construction and maintenance activities of the SNR power supply system. Large pieces of equipment include, but are not necessarily limited to: crawler tractors, forklift trucks, snow tractors, conductor tensioners and pullers, hydraulic cranes up to 50-ton capacity, various capacity trailers, and stationary engine generators located at remote microwave stations on mountain summits, shall be serviced. The equipment is of a wide variety of manufacturers, both domestic and foreign, and of a wide range of ages.
    - 4.14.3.2.1 The Contractor shall perform the vehicle and equipment maintenance support activities identified in this PWS at both Elverta and Redding

Maintenance Facilities. All necessary tools and equipment to do the job of equipment mechanic will be furnished by the Government. The mechanic will be required to assume responsibility for all tools not normally included on the movable property files.

4.14.3.2.2 Upon termination of the contract, all Government-furnished materials will be returned to the Government.

4.14.3.3 Scheduled Preventative Maintenance. Perform preventative maintenance in accordance with a Government-submitted Service and Inspection Work Order. Manufacturer's parts and service manuals such as Motor's or Chilton's shall be followed where appropriate. Mechanic will advise the COR of the defects and suggested course of action.

4.14.3.4 Non-scheduled maintenance. Diagnose/repair mechanical operating problems; tracing and locating problems and/or defects which cause engines, transmissions, hydraulic systems, and other major systems and their components to fail to perform to normal requirements. Mechanic will advise the COR of the defects and suggested course of action.

4.14.3.5 Service equipment. Includes, but is not limited to: washing and cleaning, fueling, checking fluid levels and adding fluids as required, tire inspection, etc. Supply (fuel, oil, antifreeze, etc) usage will be documented utilizing issuing procedures in place. Mechanic will advise the COR of the defects and suggested course of action.

4.14.4 Field Service Calls. In the performance of Field Service Calls, authorization for overtime may be granted via voice/email from the mechanic to the COR and/or the requesting Foreman II. The COR and /or the requesting Foreman II must contact the CO with details. A criteria test (see Appendix D) will be used for each overtime situation to validate a "to the advantage of Western" situation applies and is documented.

4.14.4.1 A field service call is the repair or servicing of equipment away from the Government's garage/shop area. Service calls shall be performed in the field when it is to the advantage of Western to do so. This shall include situations such as repairs of a minor nature (requiring less than 1 ½ staff hours to complete). Serviceable equipment repairs needed prior to continuing a job assignment. Repair breakdowns that may occur at any location in the SNR system, including some locations with very difficult terrain and weather conditions. Perform preventative maintenance of vehicles which are located a long distance from the Government's facilities that would make transport of the equipment to the Government's facility prior to repair impractical.

4.14.4.2 The Contractor shall perform services in a journeyman-like manner and follow recommendations as listed in the equipment manufacturers' manuals when available. It should be noted that in order to service equipment as required, a wide range of knowledge, skills, and abilities is required and includes, but not is limited to, correcting deficiencies on all major systems and subsystems as described: Engines, Diesel-Cummins, Cat, Detroit, Hercules, White, Perkins, Waukesha, Mercedes, Komatsu, Kohler, Ford, Case, Allis-Chalmers, John

Deer; Gasoline – commercial and industrial, both foreign and domestic and propane gas. Utilize scientific diagnostic equipment for a wide variety of makes and models of two and four cycle engines to correct malfunction of internal and external parts and sub-systems such as charging and starting systems, fuel injection, carburetor and pump systems, cooling, and compliance with clean air standards.

- 4.14.4.2.1 Power Train. Repair or replace power train components such as single and multiple gear-type transmissions, automatic and power shift transmission, differentials, mechanical and hydraulic clutches, universal and multiple drive axles and hub assemblies.
- 4.14.4.2.2 Brakes. Repair and replace a wide variety of braking and anti-skid systems utilizing air, hydraulic or electric servo mechanisms or a combination. This includes drum, lock, vacuum brakes, combination air/vacuum brakes, inching brakes, wedge, and S-Cam brakes.
- 4.14.4.2.3 Hydraulics. Utilize advanced diagnostic techniques and theory to isolate and correct problems in high pressure (3-5000 psi) and extra-high pressure (10,000 psi) hydraulic systems used on heavy equipment such as cranes, backhoes, and track-type bulldozers. This includes reading complex hydraulic manufacturers' schematics and interpreting incomplete or incorrect engineering drawings in schematics. Must utilize advanced hydraulics theory in balancing or modifying hydraulic controls and components to assure safe and functional operation according to Western, Occupational Safety and Health Administration, and Department of Transportation standards. This requires the utilization of specialized tools and test equipment and the ability to overhaul actuator, controls, accumulator charging, and hydroelectric servo mechanisms, and adjusting snubbing and regulating valves.
- 4.14.4.2.4 Suspension and Steering. Diagnose and correct steering problems through modification to suspension and axle configurations, alignment, wheel balancing, dual wheel axle, rear wheel tracking, air suspension axles, adjustment or replacement of suspension components, steering gear adjustment ( power and manual), frame alignment, shock, control arms, street tracks, torque arms, bushings, kingpins, ball joints, etc. Alignment as defined here includes conventional steering and multiple axle hydraulically-steered heavy transport trailers up to and including 250-ton capacity.
- 4.14.4.2.5 Electrical Systems. Utilize electrical test equipment, correct problems, or make modifications on electrical systems 12, 18, 36, 48, 72 volt associated with batteries, starters, regulators, charging devices, controls, meters, traction motors, and powered accessories. Require design and modification of electrical systems.
- 4.14.4.2.6 Miscellaneous. Perform miscellaneous repairs to the vehicle bodies (tailgate, latches, air conditioning, windows, etc.); repair flat tires, mounts and replace tires, deliver and pick up vehicles, steam clean top

and undercarriage, plus inspect vehicles for any necessary repairs. Complete overhaul of engines, transmissions, and other major components, as time permits. Maintain fuel station pumps.

4.14.4.3 Diagnosing mechanical defects will require knowledge of a wide range of diagnostic and test equipment, such as engine analyzers, vacuums and fuel testers, injector testers, tachometers, ohmmeters, etc. Usage of technical manuals, illustrations, specifications, schematics, and similar guides will be necessary to accomplish repairs. Some repairs will require difficult and unusually precise fitting and adjusting of moving parts due to combinations of systems in a single, complex, mechanical assembly such as multi-system transmissions and a variety of intricate fuel injection systems. Knowledge of electrical systems, transistors, and other non-mechanical systems will be required for some repairs.

## 5.0 **DELIVERABLES**

<b>Deliverable</b>	<b>Frequency</b>	<b>Paragraph Reference</b>
Security Investigation Documentation	2 weeks after award. Must be turned in within two weeks.	¶2.3.2
Quality Control Plan	2 weeks after award and as required	¶2.4
Performance Contingency Plan	2 weeks after award and as required/requested	¶2.5
Travel, Training & OT Rpts	Monthly	¶2.7, 2.8, 2.9
Safety Program	60 days after award	¶2.12.1
Budget & Performance Rpts	Monthly	¶3.3

## 6.0 **PERFORMANCE ASSESSMENT PLAN**

- 6.1 **Monitoring Performance.** The COR will track Contractor performance. The COR will surveil Contractor performance in accordance with the Quality Assurance Surveillance Plan and report to the CO.
- 6.2 **Contractor Self-Assessment.** The Contractor may provide a written self-assessment of its performance to the COR to be considered in its report to the CO. The self-assessment shall address both the strengths and weaknesses of the Contractor's performance. Where deficiencies in performance are noted, the Contractor shall describe the actions planned or taken to correct such deficiencies and avoid recurrence.
- 6.3 **COR Recommendation.** The COR will consider all evaluations and any other pertinent information and will prepare a report to the CO with findings and recommendations.
- 6.4 **Performance Determination.** The CO may meet with the COR to discuss the COR's report. The CO shall evaluate surveillance results and make a final performance determination in writing



as to the percentage of work successfully completed and the resulting payment to be made. A copy of the performance determination will be provided to the Contractor no later than 45 calendar days after the end of the period being evaluated. All CO decisions regarding performance assessments are unilateral decisions made solely at the discretion of the Government.

- 6.5 **Unacceptable Performance.** Notwithstanding any other clause of this contract, unacceptable performance deductions will be made within the later of 60 days after the end of the evaluation period or 30 days after receipt of an approved invoice.

## **7.0 Performance Requirements Summary (PRS) – Administrative Professional Support Performance Standards**

- 1) Services shall be evaluated by Timeliness, Quality, and Accuracy**
- 2) Attendance for Government scheduled meetings shall be evaluated by Timeliness and Quality**

<b>Required Service</b>	<b>Standard</b>	<b>Means of Measurement</b>	<b>Frequency/Comments</b>
<b>7.1</b> Contractor shall comply with the Scope of Work IAW PWS ¶ 2.0 thru 2.11.3	As monitored by appropriate COR(s)	Customer Complaints Document Review COR Surveillance	Daily, on-going, recurring requirements
<b>7.2</b> Contractor shall comply with the Summary of Requirements IAW PWS ¶ 3.0 thru 3.7.5	As monitored by appropriate COR(s)	Customer Complaints Document Review	Daily, on-going, recurring requirements

Required Service	Standard	Means of Measurement	Frequency/Comments
<p><b>7.3</b> Administrative Services shall be provided IAW PWS ¶ 4.1 thru 4.1.8.1</p>	<p>100% coverage of multi-line phone during normal business hours</p> <p>Monitor use of Govern. vehicles</p> <p>Schedule appointments &amp; coordinate conferences/meetings</p> <p>Prepare &amp; review various documents from draft to final</p> <p>Focal point for records management</p> <p>Maintain engineering &amp; drawings file system</p> <p>Develop &amp; Track Software assets &amp; licenses</p> <p>Process reproduction requests following regulations &amp; policies</p> <p>All mail is handled IAW Security directives from the Dept of Homeland Security, DOE, US Postal Service, GSA, &amp; Federal &amp; local regulations/directives</p> <p>Periodic mailroom activity reports conform to established requirements &amp; timelines</p> <p>Supply room stock is ordered in appropriate amounts &amp; maintained in a neat, clean, &amp; orderly manner.</p>	<p>Customer Complaints</p> <p>Document Review</p> <p>COR Observation</p>	<p>Daily, on-going, recurring requirements</p> <p>Daily, on-going, recurring requirements</p> <p>Daily, on-going, recurring requirements</p> <p>As stipulated in customer requests</p> <p>Periodic review (no less than quarterly)</p> <p>Periodic review (as frequent as quarterly but no less than annually)</p> <p>Periodic review (as frequent as quarterly but no less than annually)</p> <p>As stipulated in customer requests</p> <p>Daily, on-going, recurring requirements</p> <p>As reports are required/requested</p> <p>Periodic review (no less than quarterly)</p>

Required Service	Standard	Means of Measurement	Frequency/Comments
7.4 Administrative Assistant Services shall be provided IAW PWS ¶ 4.2 thru 4.2.10	<p>Duties are performed IAW 4.1.1/4.1.2.1/4.1.2.2/4.1.4.1/4.1.4.2/ 4.1.4.3/4.1.4.4/4.1.5.1/ 4.1.6.2</p> <p>Assure final review of outgoing mail</p> <p>Attend, record, summarize &amp; distribute the minutes of meetings</p> <p>Develop action items/suspense dates</p> <p>Record/review/&amp; correct T&amp;A</p> <p>Make Travel Training Arrangements</p> <p>Enter Purchase Requests</p> <p>Maintain/Track/renew misc. service/ Maintenance agreements.</p> <p>Create/modify/spreadsheets</p> <p>Establish/maintain/revise/terminate office files to meet current needs</p> <p>Assist personnel with proper use of office equipment &amp; place maintenance/service calls when scheduled or required</p>	<p>Customer Complaints</p> <p>Document Review</p> <p>COR Observation</p>	<p>Daily, on-going, recurring requirements</p> <p>Daily, on-going, recurring requirements</p> <p>Daily, on-going, recurring requirements</p> <p>Daily, on-going, recurring requirements</p> <p>Daily, on-going, recurring requirements</p> <p>As needed</p> <p>As needed</p>

Required Service	Standard	Means of Measurement	Frequency/Comments
<b>7.5</b> Lands Support: Realty Technician shall be provided IAW PWS ¶ 4.3.1 thru 4.3.1.17	Enter & Track Purchase Requests Research Land's Agreements, licenses, titles etc & contact owners Maintain Encroachment Report Review, update & monitor Tamis Read, review & interpret maps/GIS Compose/Edit letters, contracts, memorandums, license agreements Perform data entry into REIS and maintain computerized listing of trimming areas	Customer Complaints Document Review	Daily, on-going, recurring requirements Daily, on-going, recurring requirements  Monthly Daily, on-going, recurring requirements Daily, on-going, recurring requirements Daily, on-going, recurring requirements  As needed
<b>7.6</b> Purchasing Assistant Support shall be provided IAW PWS ¶ 4.4 thru 4.4.9	Develops & prepares procurement files & documents Evaluates bids/proposals Administers Contracts & Monitors contractor performance Conducts research & inquires of procurement related data	Customer Complaints Document Review	Daily, on-going, recurring requirements Daily, on-going, recurring requirements Daily, on-going, recurring requirements Daily, on-going, recurring requirements

Required Service	Standard	Means of Measurement	Frequency/Comments
<b>7.7</b> Environmental Administrative Services shall be provided IAW PWS ¶ 4.5. thru 4.5.4.9.4	Administrative related records, reports & correspondence, the setting up of meetings, & resolving problems is accomplished accurately & reliably	Customer Complaints Document Review	Daily, on-going, recurring requirements 100% document review and validated customer feedback

Required Service	Standard	Means of Measurement	Frequency/Comments
<p><b>7.8</b> Environmental Compliance Services shall be provided IAW PWS ¶4.6 thru 4.6.12</p>	<p>Provides technical expertise/ assistance as needed in the identification, planning, review, and execution of site investigations, sampling/lab analysis, documentation maintenance, and remediation plans to remove any hazardous and/or toxic wastes on SNR owned or operated property IAW all applicable Federal, State, and local environmental laws.</p> <p>Interprets and assists in preparing appropriate guidelines for the use, storage, handling, and disposal of hazardous materials and chemicals used by Western employees and/or contractors in accordance with Federal, State, and local environmental requirements.</p> <p>Interprets and assists with the pollution prevention program and goals.</p>	<p>Customer Complaints</p> <p>Document Review</p>	<p>Daily, on-going, recurring requirements</p> <p>100% document review and validated customer feedback</p>

Required Service	Standard	Means of Measurement	Frequency/Comments
<b>7.9</b> Geographic Information Systems Services shall be provided IAW PWS ¶ 4.7 thru 4.7.16	Prepare maps IAW client needs Assist in field data collection Assist with all GIS/GPS related needs Maintain GIS Map Gallery webpage	Customer Complaints Document Review	Daily, on-going, recurring requirements Daily, on-going, recurring requirements 100% document review and validated customer feedback 100% document review and validated customer feedback
<b>7.10</b> Settlements & Power Billing Accounting and Analysis Support shall be provided IAW PWS ¶ 4.8 thru 4.8.8.17	Attend, participate & engage in meetings Extract data consistent with CAISO protocols & payment calendar Review/Reconcile and report meter, schedule & pricing information Process, allocate, & estimate invoices for Power Bills Extract &/or review initial statement data	Customer Complaint Based on CAISO payment calendar No missing data reported w/o documented exceptions; prepare invoice for settlements by 9:00 am next business day or CAISO payment calendar Prepare by the 6 <sup>th</sup> of the following month or by CAISO payment calendar Prepare within 6 days after estimated statement or by CAISO payment calendar	As attendance is requested/required Daily. Statement must be within 2% variance of industry standard Daily. Statement must be within 2% variance of industry standard (Industry Standard is 98% Settlement Quality Data) Daily. Statement Quality Data Daily. Statement Quality Data



Required Service	Standard	Means of Measurement	Frequency/Comments
<b>7.11</b> Power Marketing & Business Process Analyst support shall be provided IAW PWS ¶ 4.9 thru 4.9.5	<p>Attend, participate &amp; engage in meetings</p> <p>Assist in identifying, analyzing, &amp; automating and implementing business processes, procedures, &amp; protocols</p> <p>Provide technical analysis &amp; process improvement</p> <p>Develop, automate, &amp; deploy queries to enable data mining activities</p> <p>Monitor status of IT systems development design &amp; implementation assessing risks &amp; performing earned value management</p> <p>Develop, Automate &amp; Deploy Reporting tools &amp; reports supporting Data Activities</p>	<p>Customer Complaint</p> <p>Quarterly Status &amp; Review of Documentation Development &amp; Completion</p> <p>Technical Content &amp; Relevance of documentation</p> <p>Quarterly Status</p> <p>Quarterly Status</p>	<p>As attendance is requested/required</p> <p>Daily, on-going, recurring requirements</p> <p>Daily, on-going, recurring requirements</p> <p>Daily, on-going, recurring requirements</p> <p>Daily, on-going, recurring requirements</p>

Required Service	Standard	Means of Measurement	Frequency/Comments
<b>7.12</b> Finance: Accounting Technicians: Accounts Payable & Accounts Receivable Support shall be provided IAW PWS ¶ 4.10.1. thru 4.10.1.10	<p>Ensures accurate &amp; timely delivery of billing to SNR power customers</p> <p>Performs accounts payable function</p> <p>Processes misc. claims for reimbursement</p> <p>Assist with review of monthly financial reports</p> <p>Maintains working files of the BIDSS accounting reports</p> <p>Performs accounts receivable function including the accurate &amp; timely delivery of billing to SNR power customers as well as the receivable collection activities.</p> <p>Assists with computer input of a variety of financial system data</p> <p>Performs year-end processes</p>	<p>Customer Complaints</p> <p>Document Review</p>	<p>Daily/Monthly as required/requested</p> <p>Daily/Monthly on-going, recurring requirements</p> <p>Daily/Monthly recurring requirements</p> <p>Annually</p>
<b>7.13</b> Facility Management Support shall be provided IAW PWS ¶ 4.11 thru 4.11.9	<p>Service calls &amp; misc. tasks</p> <p>Furniture reconfiguration &amp; other repairs</p> <p>Preventative Maint &amp; Equip tours</p> <p>Security/Safety/Health</p>	<p>Customer Complaints</p> <p>Document Review</p>	<p>Each work shift</p> <p>Per project</p> <p>Per preventative maintenance schedule/program</p> <p>Each work shift</p>

<b>Required Service</b>	<b>Standard</b>	<b>Means of Measurement</b>	<b>Frequency/Comments</b>
<b>7.14</b> Maintenance Management Technician shall be provided IAW ¶ 4.12 thru 4.12.3	Coordinate, administer, and manage Computerized Maintenance Management System (CMMS) for the Region e.g. Provide assistance, guidance, training, equipment inventory, reporting, etc...	Customer Complaints Document Review	Daily, on-going, recurring requirements & as requested/required
<b>7.15</b> Safety and Security Technician shall be provided IAW PWS ¶ 4.13.1 thru 4.13.1.2.15	Support and services shall be accomplished accurately and reliably on a daily basis during contract performance period	Customer Complaints, Program and Document Reviews	Daily, on-going, recurring requirements  100% feedback from customers, program reviews, and surveillance of duties performed
<b>7.16</b> Warehouse Services shall be provided IAW PWS ¶ 4.14 thru 4.14.1.1.5.17	Maintain SNR inventory stock levels IAW WAPA property management business rules & crib sheets  Ensure stock is efficiently organized  Perform yearly stock inventory and random spot checks in conjunction with PMO	Customer Complaints Document Review	Quarterly  Daily, on-going, recurring requirements  Yearly or as required/requested
<b>7.17</b> Utility/Warehousing Services shall be provided IAW PWS ¶ 4.14.2 thru 4.14.2.4	Organize & deliver required items to outlying SNR sites  Perform routine repairs & maintenance.  Prepare shipping of outgoing freight  Fill region signage requests  Complete customer utility work requests	Customer Complaints Document Review	Daily, on-going, recurring requirements  Daily, on-going, recurring requirements  Daily, on-going, recurring requirements  As required/requested

<b>Required Service</b>	<b>Standard</b>	<b>Means of Measurement</b>	<b>Frequency/Comments</b>
<b>7.18</b> Vehicle & Equipment Maintenance Services shall be provided IAW PWS ¶ 4.14.3 thru 4.14.3.5	Perform vehicle service, repairs, & maintenance on all GSA-leased and DOE owned vehicles  Perform repair & maintenance on all heavy equipment  Complete customer vehicle repair requests	Customer Complaints  Document Review	Daily, on-going, recurring requirements &  Weekly Service Checks   As required/requested
<b>7.19</b> Field Service Calls shall be provided IAW PWS ¶ 4.14.4 thru 4.14.4.3	Perform misc. tasks; vehicle body repair, hitch/tailgate issues, vehicle inspection, vehicle delivery/pick-up, fuel station pump repairs	Customer Complaints  Document Review	Daily, on-going, recurring requirements &  As requested/required
<b>7.20</b> Deliverables: Contractor shall comply with requirements and delivery IAW PWS ¶ 5.0	As specified in PWS ¶ 5.0	Customer Complaints  Document Review	As specified or as required/requested
<b>7.21</b> Contractor shall comply with current property management policy/guidelines for the use, handling, storage, and reporting of Government Property IAW PWS Appendix C	As monitored by appropriate COR	Customer Complaints  Document Review	Daily, on-going, recurring requirements

## 8.0 QUALITY ASSURANCE SURVEILLANCE PLAN.

The Quality Assurance Surveillance Plan (QASP) is one evaluation method the government uses to perform surveillance to determine whether the Contractor meets the standards of performance as defined in the PWS. The absence of the a QASP for any contract requirement, however, shall not detract from its enforceability or limit the rights or remedies of the government under any other provision of the contract, to include the “Inspection of Services” clause, in determining the quality of the Contractor performance.

(1) Services (shall be evaluated by Timeliness, Quality, and Accuracy) (2) Attendance (shall be evaluated by Timeliness and Quality)

Required Service		Completed Y/N	COMMENT	COR Signature & Date
8.1	Contractor complied with Scope of Work IAW PWS ¶ 2.0 thru 2.11.3			
8.2	Contractor complied with Summary of Requirements IAW PWS ¶ 3.0 thru 3.7.5			
8.3	Contractor provided Administrative Services IAW PWS ¶ 4.1 thru 4.1.8.1			
8.4	Contractor provided Administrative Assistant Services IAW PWS ¶ 4.2 thru 4.2.10			
8.5	Contractor provided Realty Technician Support IAW PWS ¶ 4.3.1 thru 4.3.1.17			
8.6	Contractor provided Purchasing Assistant Support IAW PWS ¶ 4.4 thru 4.4.9			

Required Service		Completed Y/N	COMMENT	COR Signature & Date
8.7	Contractor provided Environmental Technician Services IAW PWS ¶ 4.5. thru 4.5.4.9.4			
8.8	Environmental Compliance Services IAW PWS ¶ 4.6 thru 4.6.12			
8.9	Contractor provided Geographic Information Systems Services IAW PWS ¶ 4.7 thru 4.7.16			
8.10	Contractor provided Settlements & Power Billing Accounting and Analysis Support IAW PWS ¶ 4.8 thru 4.8.8.17			
8.11	Contractor provided Power Marketing & Business Process Analyst Support IAW PWS ¶ 4.9 thru 4.9.5			
8.12	Contractor provided Accounting Technician Support IAW PWS ¶ 4.10.1. thru 4.10.1.10			
8.13	Contractor provided Facility Management Support IAW PWS ¶ 4.11 thru 4.11.9			
8.14	Contractor provided Maintenance Management Support IAW PWS ¶ 4.12 thru 4.12.3			
8.15	Contractor provided Safety and Security Technician Support IAW PWS ¶ 4.13.1 thru 4.13.1.2.15			

Required Service		Completed Y/N	COMMENT	COR Signature & Date
8.16	Contractor provided Warehouse Services IAW PWS ¶ 4.14 thru 4.14.1.1.5.17			
8.17	Contractor provided Utility/Warehousing Services IAW PWS ¶ 4.14.2 thru 4.14.2.4			
8.18	Contractor provided Vehicle & Equipment Maintenance Services IAW PWS ¶ 4.14.3 thru 4.14.3.5			
8.19	Contractor provided Field Service Calls IAW PWS ¶ 4.14.4 thru 4.14.4.3			
8.20	Receipt of Deliverables: Contractor complied with requirements and delivery schedule IAW PWS ¶ 5.0			
8.21	Contractor complied with current property management policy/guidelines for the handling, storage, and reporting of Government Property IAW PWS Appendix C			

## **APPENDICES**



## Appendix A

APPLICATION/OPERATING SYSTEM	
<b>Microsoft:</b>	Windows Server with clustering services/Workstation(s); Office XP 2007 or higher; Project 2007 or higher; Visio 2002 or higher; SQL Server with clustering services 2005 or higher; Visual Basic; Remote RAS; IIS 5
<b>Novell:</b>	Netware Server Version 5 or higher/Client Version 4 or higher; GroupWise Version 7 or higher; ZENworks for Desktop Version 7 or higher; CITRIX; Presentation Server
<b>Roxio:</b>	Easy CD Creator Version 5 or higher
<b>Environmental Systems Research Institute, Inc (ESRI):</b>	
<b>ESRI:</b>	Windows XP Professional/ARCGIS; Windows XP Professional/ARCIMS
<b>Adobe:</b>	Acrobat 5 or higher
<b>InMagic:</b>	DBText Writer/Web Publisher
<b>Autodesk:</b>	AutoCAD Version 13 or higher
<b>Macromedia:</b>	Contribute
<b>Open Access Technology International (OATI):</b>	
	E-Tag Merchant Transaction Management System (MTMS) WebTrader Reliability Interchange Scheduling System (RISS) Settlement System
<b>EDI- Electronic Data Interface Invoicing</b>	
<b>BIDSS</b> (Financial Application)	
<b>California Independent System Operator (CAISO) Scheduling</b>	

Reference:

Environmental Systems Research Institute - <http://www.esri.com>

Novell - <http://www.novell.com>

CD Writer - <http://www.roxio.com>

nMarket - [http://www.scgo.com/products.na\\_California.jsp](http://www.scgo.com/products.na_California.jsp)

Novell - <http://www.novell.com>

## Appendix B

### Position Descriptions

### Qualification Requirements

1. Qualifications Requirements. Contractor shall be responsible for assuring that technically proficient and experienced personnel are available at all times to meet the needs of Western. Contractor shall be responsible for assuring all personnel hired under this contract shall be able to perform their assigned tasks or demonstrate an ability to become proficient after a short orientation period. Wherever mandatory minimum industry standards exist (i.e., professional certification requirements), Contractor shall assure that assigned personnel are in compliance. All personnel shall meet the Qualification Requirements for the position they are assigned to.
2. Key Positions. The PM is a key position for the performance of this support services contract. Contractor shall submit a resume for approval by Western's Administrative Officer and the CO prior to filling of the PM position. Any changes to the key position will be subject to the approval of the CO.
3. Professional Requirements by Skill Sets. SNR has identified general skill sets that have historically been utilized. These skill sets are not binding in terms of staff level or skills but Contractor shall be responsible for accomplishing work at acceptable level of performance.
  - a. Program Manager. The program manager (PM) must have strong organizational, analytical, and written/oral communication skills. He/she must also demonstrate that he/she has had progressively more responsible and diverse supervisory and managerial experience commensurate with the scope of activities identified for each of the Administrative, Professional, and Warehousing/Logistical Support categories identified in the PSW statement of work. At a minimum, the PM must have a minimum of 5 years of cumulative direct supervisory and/or managerial experience supervising the scope of activities which encompasses at least 2 of the three categories identified in the PWS scope of work with an emphasis on the administrative functions.
  - b. Settlements and Power Billing Accounting and Analyses; Minimum requirements (GS7-9 comparable) knowledge of public utility practices- electric energy preferred, ability to: assess purchase or sale of electric energy; analyze financial statements and subsequent invoices; perform accounting functions inclusive or reconciliation and verification of data gathered for purpose of creating reports. Intermediate certification in Microsoft Excel or equivalent, advanced certification preferred. Intermediate level requirements: Ability to perform duties requiring knowledge concerning public utility business practices- electric energy preferred; perform reasonable assessment and applicability of financial statements, inclusive of validation and reconciliation; perform accounting functions inclusive of reconciliation and verification of data gathered for purposes of creating reports and stating financial position. Assist in the development and analysis of financial methodologies for power related sources. Skills and ability to perform accounting work that requires application of Generally Accepted Accounting Principles and Practices. Intermediate certification in Microsoft Excel or equivalent. Senior level accountant requires the ability to: perform duties requiring knowledge concerning public utility business practices – electric energy preferred. Ability to prepare analyses on the effects and impacts of various operational, financial, and pricing issues on power, transmission and power related services. Ability to assist in design, development, implementation in technology

upgrades, inclusive of developing test scripts of all applicable test scenarios. Intermediate to advanced certification in Microsoft Excel or equivalent.

- c. Facility Mechanic. The contractor performing these duties should be a journeyman level building maintenance mechanic and must be able to: read and understand basic building blue prints; work unsupervised to perform most duties; prioritize and plan work to accomplish the tasks assigned in the most efficient manner. The employee must be technically and physically capable of performing the duties of the position. The work is physically demanding and requires heavy lifting, exposure to hot and cold interior and exterior environments as well as cramped spaces. The employee will be exposed to basic mechanical chemicals such as: grease, oil, Freon, cleaners, paint, solvents, etc. Therefore the contractor must be familiar with the use of personal protective equipment and must use the appropriate equipment for the task at hand. Must possess a valid class C Drivers license. A Systems Maintenance Technician certification from BOMI or AFE is preferred.
- d. Environmental Compliance Specialist. Knowledge of physical sciences is required in order to conduct work in a multidisciplinary program from an environmental protection perspective. Knowledge of high voltage electrical transmission practices, requirements, business climate and other factors that may relate to environmental requirements. Knowledge of DOE requirements or ability to learn such requirements in a timely manner to complete tasks as required. Knowledge of facilities and equipment within the operating system is required to develop practical methods and procedures for regulatory compliance and environmental protection.
- e. Safety and Security Technician. The ability to identify and assist in researching work processes and requirements that detail the need for special personal protective equipment, safety hazards and conditions, and established occupational safety and health standards for an industrial environment and work place. The ability to assist in researching safety and security regulations that cover industry requirements which could include OSHA electrical, construction and general industry standards (state and Federal application). The ability to provide administrative support for the use of word processing, computer filing and document processes, spreadsheets, reports, and other computer support software applications and maintain associated records. Ability to assist in providing the Safety and Security function the support needed to meet field visits for training, job site visits, inspections, audits and associated field activities. Ability to communicate, orally and in writing. Demonstrated ability to gather personal, safety and/or security sensitive information and maintain confidentiality. Demonstrated experience (at least 1 year) associated with human resources, worker's compensation program or other aspects of the health and safety profession that shows knowledge of program functions

## Appendix C

**Government-Furnished Property:** The Contractor shall comply with current property management, policy/guidelines for the safeguarding, handling, storage, and reporting of Government property.

The following resources will be furnished by the Government, subject to Notes (I) and (II):

- A. All equipment and materials in reasonable quantities, including but not limited to:
  - (1) Office equipment including:
    - (a) Telephones
    - (b) Calculators
    - (c) Personal computers
    - (d) Printers
    - (e) Copying machines
    - (f) Fax machines
  - (2) Supplies and furniture including:
    - (a) Paper
    - (b) Pencils and/or pens
    - (c) Desks
    - (d) Chairs
    - (e) Work tables
  - (3) Systems furniture workstations
  - (4) Adequate access to:
    - (a) Computer systems
    - (b) Hardware
    - (c) Software
- B. Government-Leased Vehicles – The Government shall furnish vehicles for the use by contract employees for the performance of work required by the contract. Each contractor employee is required to possess a valid driver license.

Notes:

- I. The equipment and facilities provided will vary based on the Government's assessment of current needs and the CO or COR's decision as to whether and how to meet those needs.
- II. Requests for additional equipment or supplies or replacement items will be made to the Manager or Contracting Officer Representative

**Appendix D**

**Contractor Overtime Request to Support Field Service Calls**

Contractor Employee Name: \_\_\_\_\_

Request Date: \_\_\_\_\_

Overtime Date: \_\_\_\_\_

Estimated # of hours: \_\_\_\_\_

COR and/or Foreman II signature: \_\_\_\_\_

Situation/Problem: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Overtime Policy:**

**Authorization for overtime may be granted via voice/e-mail from the contractor to the COR and/or the requesting Foreman II. The COR and/or the requesting Foreman II must contact the CO with details. The below criteria test will be used for each overtime situation to validate that a “to the advantage of Western” situation applies and is documented.**

**At least 1 of the below criteria must apply for overtime to be warranted:**

WAPA property and/or personnel will be unsafe. ☐

Without overtime to address/fix the problem, restoration of a power outage will be prevented or delayed. ☐

Unforeseen circumstances: Ex. Vehicle break-down, employee accident, etc. ☐

Other circumstances, as detailed here: ☐

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Additional comments:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Contractor OT Request.doc